



METROPOLITAN
TRANSPORTATION
COMMISSION

Agenda Item No. 3

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Memorandum

TO: Operations Committee

DATE: November 7, 2008

FR: Executive Director

W.I.

RE: TransLink[®] Program Contract Actions

The TransLink[®] electronic fare payment system is fully operational and available to the public on AC Transit and Golden Gate Transit and Ferry. San Francisco Municipal Transportation Authority (SFMTA) and Caltrain – both part of Phase 2.3 of TransLink[®] deployment – have initiated their soft launches. The schedule currently projects that TransLink[®] will achieve “revenue-ready” status on BART in April 2009.

In September, SFMTA invited employees to use TransLink[®] on their fleet as the first stage of their soft launch. Starting in December, they will invite the public and members of their stakeholder organizations to participate. Their ultimate soft launch goal is to have 15,000 weekday transactions. Caltrain is proposing a more modest soft launch, with a goal of 400 daily users. By the end of September, average TransLink[®] system-wide usage volume exceeded 17,000 transactions per weekday, which represents an 11% increase from August.

Staff recommends that the Operations Committee authorize the Executive Director or his designee to execute the following contract actions in support of the launch on SFMTA and Caltrain (Phase 2.3), AC Transit equipment installation and the TransLink[®] employer benefits program.

Phase 2.3 Launch Contract Change Orders and Amendments

- i. **Contract Amendment – Marketing, Web and Communication Services: Swirl, Inc. (\$680,000)** to support marketing initiatives for the remainder of FY2008-09 for the agencies now operating TransLink[®]; coordination of regional marketing strategies; enhancements to the TransLink[®] website; and development of marketing materials. Staff is concurrently requesting funding for this amendment in the amount of \$680,000 at the November Programming and Allocations Committee meeting.
- ii. **Contract Amendment – Technical Support for SFMTA Soft Launch: Auriga Corp. (\$224,000)** to provide technical support for marketing related to the launch on SFMTA. Auriga Corp. was approved by this Committee as one of the “on-call” consultants for the TransLink[®] Consultant Assistance Program in April 2007. This contract amendment in the amount of \$224,000 extends Auriga’s services for the remainder of FY 2008-09. Staff is concurrently requesting funding for this contract amendment at the November Programming and Allocations Committee meeting.

iii. TransLink[®] Contract Change Orders – Motorola, Inc.

Change Order #114, SFMTA Soft Launch Maintenance Assistance (\$84,000) supports transition of maintenance responsibility from Motorola, Inc. to SFMTA now that the system is in full operation. The TransLink[®] Contractor will provide three on-call staff at SFMTA maintenance yards for 12 consecutive weeks at a cost of \$84,000. These personnel will assist with the transition of front line maintenance responsibilities to SFMTA staff, and provide additional training, as requested.

Change Order #115, SFMTA Vehicle Installation Support: Motorola, Inc. (\$65,000) to SFMTA has requested that the TransLink[®] Contractor adjust the installation of equipment on a subset of approximately 100 of their vehicles. Although the installations met previously agreed to design requirements, they do not meet SFMTA's operating standards. Change Order #115 will address the identified deficiencies at a cost of \$65,000.

iv. Funding Agreement Amendment – Caltrain Marketing Activities: Peninsula Joint Powers Board (\$70,000)

to hire a consultant to plan and direct marketing activities for the soft launch on Caltrain for a 6 month period. Staff is concurrently requesting funding for this contract amendment in the amount of \$70,000 at the November Programming and Allocations Committee meeting.

Other TransLink[®] Program Contract Actions

v. TransLink[®] Contract Change Orders: Motorola, Inc.

Change Order #109 Amendment No. 2, Employer Program/Employer Program Website (\$107,000) The TransLink[®] distribution network includes several options for customers to acquire and add value to their cards. Previous change orders provided for the development of a new website that allows TransLink[®] cardholders to apply pre-tax transit benefits directly to TransLink[®] cards. Change Order #109 Amendment No. 2 provides additional funding in the amount of \$107,000 to complete website development and testing.

Change Order #52 Amendment No. 2, Installation of AC Transit Onboard Equipment: (\$80,000) The TransLink[®] Contractor will install equipment on 65 additional AC Transit vehicles for a total cost for installations of \$178,500. Amendment No. 1 authorized the TransLink[®] Contractor to perform the first 40 installations at a cost of \$98,500. This Amendment No. 2 adds the remaining \$80,000.

vi. Contract Amendment – Distribution and Communications Support Services: Synapse Strategies (\$74,000)

Synapse Strategies provides distribution and communications planning and support for the rollout of TransLink[®]. This contract amendment will support marketing and distribution initiatives for the transit agencies who are already operating TransLink[®] and coordinate regional marketing strategies for the remainder of FY2008-09. Staff is concurrently requesting funding for this contract amendment in the amount of \$74,000 at the November Programming and Allocations Committee meeting.

Steve Heminger

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Contract Amendment

Work Item No.:	105-1223
Contractor:	Swirl, Inc. San Francisco, CA
Project Title:	TransLink [®] Marketing, Web, and Communications Services
Purpose of Project:	Provide regional and transit agency-specific marketing support for the roll-out of TransLink [®]
Brief Scope of Work:	Develop and implement TransLink [®] marketing initiatives for the agencies now operating TransLink [®] ; coordinate regional TransLink [®] marketing strategies; develop enhancements to the TransLink [®] website; and develop and produce TransLink [®] marketing materials
Project Cost Not to Exceed:	\$680,000
Funding Source:	RM-2 Operating
Fiscal Impact:	Subject to November 2009 Programming and Allocations Committee approval
Motion by Committee:	That the Executive Director or his designee is authorized to negotiate and enter into a contract amendment for TransLink [®] marketing, web and communications services and the Chief Financial Officer is authorized to set aside funds up to \$680,000 for such a contract amendment.
Operations Committee:	<hr/> Sue Lempert, Chair
Approved:	Date: November 14, 2008

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Contract Amendment

Work Item No.: 105-1221

Contractor: Auriga, Corp.
Milpitas, CA

Project Title: Technical Support for San Francisco Municipal
Transportation Agency/TransLink[®] Marketing Activities

Purpose of Project: Provide technical support to the San Francisco Municipal
Transportation Agency for the soft launch of TransLink[®]
on the San Francisco Muni system

Brief Scope of Work: Develop and implement detailed strategies for the rollout
of TransLink[®] on the SFMTA system; update the SFMTA
website to include TransLink[®]-related content; support
fare and boarding policy analyses, developing a program
for modifying SFMTA's fare policies to encourage
adoption of TransLink[®]; and support integration of
TransLink[®] into the replacement SFMTA automated fare
collection system

Project Cost Not to Exceed: \$224,000

Funding Source: RM-2 Operating; Subject to November 2009 Programming and
Allocations Committee approval

Fiscal Impact: None

Motion by Committee: That the Executive Director or his designee is authorized to
negotiate and enter into a contract amendment for technical
support for SFMTA/TransLink[®] marketing activities and the
Chief Financial Officer is authorized to set aside funds up to
\$224,000 for such a contract amendment.

Operations Committee:

Sue Lempert, Chair

Approved: Date: November 14, 2008

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Change Order

Work Item No.: 310-2740

Contractor: Motorola, Inc.
Schaumburg, IL

Project Title: Change Order No. 114: SFMTA Soft Launch
Maintenance Assistance

Purpose of Project: Temporarily assist SFMTA maintenance personnel with TransLink[®] and to provide additional maintenance-related training

Brief Scope of Work: Assist SFMTA maintenance personnel with maintenance being performed by SFMTA personnel; provide additional training, as requested, to SFMTA maintenance personnel

Project Cost Not to Exceed: \$84,000

Funding Source: STA

Fiscal Impact: Funds included in FY 2008-09 agency budget

Motion by Committee: That the Executive Director or his designee is authorized to negotiate and enter into a change order for TransLink[®] maintenance assistance and the Chief Financial Officer is authorized to set aside funds up to \$84,000 for such a change order.

Operations Committee:

Sue Lempert, Chair

Approved:

Date: November 14, 2008

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Change Order

Work Item No.: 310-2740

Contractor: Motorola, Inc.
Schaumburg, IL

Project Title: Change Order No. 115: SFMTA Vehicle Installation Support

Purpose of Project: Adjust the installation of TransLink[®] equipment on a subset of SFMTA vehicles to ensure the installations meet SFMTA's operating standards

Brief Scope of Work: Identify and resolve installation issues on approximately 100 vehicles where initial installations of TransLink[®] equipment did not meet SFMTA's operating standards

Project Cost Not to Exceed: \$65,000

Funding Source: CMAQ

Fiscal Impact: Funds included in FY 2008-09 agency budget

Motion by Committee: That the Executive Director or his designee is authorized to negotiate and enter into a change order for SFMTA installation support and the Chief Financial Officer is authorized to set aside funds up to \$65,000 for such a change order.

Operations Committee:

Sue Lempert, Chair

Approved: Date: November 14, 2008

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Funding Agreement Amendment

Work Item No.:	105-1221
Contractor:	Peninsula Corridor Joint Powers Board San Carlos, CA
Project Title:	Caltrain/TransLink [®] Marketing Activities
Purpose of Project:	Provide funding to Caltrain to hire a consultant to develop, plan and execute TransLink [®] -related marketing activities
Brief Scope of Work:	Plan and direct TransLink [®] -related outreach events; coordinate multi-agency TransLink [®] promotions; prepare written materials and signage; promote TransLink [®] to special target audiences, e.g. seniors, riders with disabilities and youth; and survey passengers about their experience with TransLink [®]
Project Cost Not to Exceed:	\$70,000
Funding Source:	RM-2 Operating
Fiscal Impact:	Subject to November 2009 Programming and Allocations Committee approval
Motion by Committee:	That the Executive Director or his designee is authorized to negotiate and enter into a funding agreement amendment for Caltrain/TransLink [®] marketing activities and the Chief Financial Officer is authorized to set aside funds up to \$70,000 for such a funding agreement amendment.
Operations Committee:	<hr/> Sue Lempert, Chair
Approved:	Date: November 14, 2008

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Contract Change Order

Work Item No.: 310-2700

Contractor: Motorola, Inc.
Schaumburg, IL

Project Title: Change Order No. 109 Amendment No. 2, TransLink® Employer Program and Employer Program Website

Purpose of Project: Enable TransLink® cardholders to apply pre-tax transit benefits directly to TransLink® cards

Brief Scope of Work: Complete development and testing of new website that will enable TransLink® cardholders to apply pre-tax transit benefits directly to TransLink® cards

Project Cost Not to Exceed: \$107,000

Funding Source: RM-2 Capital

Fiscal Impact: Funds included in FY 2008-09 agency budget

Motion by Committee: That the Executive Director or his designee is authorized to negotiate and enter into a contract change order for development and implementation of the TransLink® employer program and program website and the Chief Financial Officer is authorized to set aside funds up to \$107,000 for such a contract change order.

Operations Committee:

Sue Lempert, Chair

Approved:

Date: November 14, 2008

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Contract Change Order

Work Item No.: 310-2704

Contractor: Motorola, Inc.
Schaumburg, IL

Project Title: Change Order No 52 Amendment No. 2, Installation of AC Transit Onboard Equipment

Purpose of Project: Provide funding to TransLink® Contractor to install additional TransLink® onboard equipment on additional AC Transit vehicles

Brief Scope of Work: Order and install TransLink® onboard equipment on up to 65 additional vehicles (per the direction of MTC staff); and test and troubleshoot devices for functionality

Project Cost Not to Exceed: \$80,000

Funding Source: CMAQ

Fiscal Impact: Funds included in FY 2008-09 agency budget

Motion by Committee: That the Executive Director or his designee is authorized to negotiate and enter into a contract change order for the installation of AC Transit onboard equipment and the Chief Financial Officer is authorized to set aside funds up to \$80,000 for such a contract change order.

Operations Committee:

Sue Lempert, Chair

Approved:

Date: November 14, 2008

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Contract Amendment

Work Item No.: 105-1221

Contractor: Synapse Strategies
Oakland, CA

Project Title: TransLink[®] Distribution and Communications Planning
and Support Services

Purpose of Project: Oversee completion of tasks related to the regionwide
implementation of TransLink[®]

Brief Scope of Work: Planning and support services related both to the
distribution of TransLink[®] cards and value and to
TransLink[®] marketing and communications initiatives

Project Cost Not to Exceed: \$74,000

Funding Source: RM-2 Operating

Fiscal Impact: Subject to November 2009 Programming and Allocations
Committee approval

Motion by Committee: That the Executive Director or his designee is authorized to
negotiate and enter into a contract amendment with Synapse
Strategies and the Chief Financial Officer is authorized to set
aside funds up to \$74,000 for such a contract amendment.

Operations Committee:

Sue Lempert, Chair

Approved: Date: November 14, 2008